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Women's Inner Fashions: Nightwear, Daywear and Loungewear

FACT FILE

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**Market Research Division
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**Women's Inner Fashions:
Nightwear, Daywear
and Loungewear**

FAIRCHILD FACT FILE

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Market Research Division

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TABLE OF CONTENTS

	Page
AT THE MANUFACTURER LEVEL:	
GENERAL STATISTICS ON THE INDUSTRY.....	1
EMPLOYMENT & EARNINGS.....	4
CONCENTRATION IN THE INDUSTRY.....	5
OPERATING RATIOS.....	7
INDUSTRY STATISTICS BY REGION.....	7
PRODUCTION.....	10
BY FABRIC/CONSTRUCTION.....	12
MATERIALS CONSUMED IN PRODUCTION.....	15
SHIPMENTS.....	16
BY LEADING STATES.....	18
PRODUCER PRICE TRENDS.....	21
FOREIGN TRADE — IMPORTS.....	21
FOREIGN TRADE — EXPORTS.....	25
AT THE RETAIL LEVEL:	
THE POTENTIAL MARKET.....	26
RETAIL SALES BY STORE TYPE.....	27
SEASONAL PATTERN IN RETAIL SALES.....	32
CONSUMER BUYING HABITS.....	35
SCHEDULE OF ADDITIONAL FACT FILES.....	41

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WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR & LOUNGEWEAR

Market Trends

The women's inner fashion industry, affected by the recession like all other aspects of women's apparel, is beginning to pick up, though somewhat subservient to the dictates of outerwear fashions. The intimate apparel companies are now aggressively seeking new, younger customers as well as maintaining older, more traditional customers, and upscaling their lines.

Preliminary 1980 production data from the National Cotton Council of America indicate a slight (1.5%) increase in women's intimate apparel compared to 1979. This increase follows a 4.9% decline in cuttings in 1979 versus 1978. The International Ladies Garment Workers Union reported in their Conditions In The Women's Garment Industry (June 16, 1981) that intimate apparel production was "sluggish" in the first part of 1981, though sleepwear seemed to do somewhat better than daywear and foundations.

Nightwear, according to industry analysts, is the major area of growth in the industry in 1981 for several reasons. Primarily, the introduction of "transitional" items, which increase the selling period for these garments well into the winter rather than the traditional shorter period of Thanksgiving to Christmas, has increased sales. These same sources also report that fabric diversification and a ready-to-wear orientation have aided sales. It is also believed that loungewear, which traditionally lags behind sleepwear, can be successfully promoted if the merchandise is modified in the same manner as noted in sleepwear.

In the innerwear segment, longer and fuller petticoats are making their appearance, in line with changing hemlines. Sales of "sports bras," the booming category over the last several years, have leveled off and are remaining rather stable. Panty sales are on the rise and analysts see several factors contributing to this, including improved presentation in stores, a tendency of stores to provide independent funding for the area, a surge in the growth of the branded business and the increasing popularity of natural fiber fabrics.

Imports continue to make gains in innerwear, registering a 13.7% gain in units and an 18.6% rise in dollars in 1980 versus 1979. A recent report by the Department of Commerce (Daily News Record, June 12, 1981) indicated that at the present time imports of nightwear are running at over 32% of production, with Taiwan claiming nearly 9% of these imports. To combat this sudden and potentially disruptive surge, the Reagan Administration has temporarily suspended export authorizations for all cotton nightwear from Taiwan. At the same time, the U.S. is also seeking a ban on imports of man-made fiber bras from South Korea for the same reasons. (WWD Aug. 7, 1981). It is reported that imports of Korean bras are up 18% for the first six months of this year compared to 1980, or from 137,364 dozen to 162,514 dozen.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 Annual Survey of Manufactures, compiled by the U.S. Census Bureau, covers the latest available industry information on women's inner fashions at the industry level. The ASM is based on a sample of manufacturers and is conducted in interim years, between the complete census of manufactures which is conducted every five years. The 1978 ASM data are adjusted for comparability with the latest census report (1977).

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Data on the women's inner garments, daywear and nightwear industries as classified in Census Bureau reports, are summarized in the following tables.

Value of shipments and miscellaneous receipts of manufacturers classified in the robes and dressing gown industry reached \$373 million in 1978, a 27.3% increase over 1977. Knit underwear mill shipments increased a respectable 15.2% to \$747.6 million. (The previous figures for robes and dressing gowns include garments for women and men while the knit underwear data includes garments for women, men, children and infants). Shipments of women's, misses', children's and infants' underwear and nightwear increased 10.4% to \$1.97 billion while brassiere, girdle and allied garments were up 6.1% to \$689.8 million.

Women's, Misses', Children's & Infants' Underwear & Nightwear (SIC 2341*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	548	609	--	-10.0%
Number of establishments, total**	638#	698	731	- 8.6%	- 4.5
Employees, total (thous.)	72.6	72.9	77.5	- 0.4	- 5.9
Production workers (thous.)	63.0	63.4	68.7	- 0.6	- 7.7
Payroll (mil. \$)	\$ 514.6	\$ 472.1	\$ 372.0	+ 9.0	+26.9
Value added by manufacture (mil. \$)##	1,042.9	915.3	790.0	+13.9	+15.9
Value of industry shipments (mil. \$)###	1,966.6	1,780.8	1,331.9	+10.4	+33.7
Capital expenditures, new (mil. \$)	21.8	18.7	19.3	+16.6	- 3.1

Brassieres, Girdles & Allied Products (SIC 2342*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	150	220	--	-31.8%
Number of establishments, total**	169#	180	272	- 6.1%	-33.8
Employees, total (thous.)	18.8	18.9	28.0	- 0.5	-32.5
Production workers (thous.)	15.1	15.2	23.2	- 0.6	-34.5
Payroll (mil. \$)	\$ 151.9	\$ 141.1	\$ 152.8	+ 7.6	- 7.7
Value added by manufacture (mil. \$)##	358.5	334.4	340.0	+ 7.2	- 1.6
Value of industry shipments (mil. \$)###	689.8	650.0	647.0	+ 6.1	+ 0.5
Capital expenditures, new (mil.\$)	6.5	4.2	4.6	+54.7	- 8.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Knit Underwear Mills (SIC 2254*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	80	74	--	+ 8.1%
Number of establishments, total**	96#	92	87	+ 4.3	+ 5.7
Employees, total (thous.)	27.5	25.2	26.0	+ 9.1	- 3.1
Production workers (thous.)	24.9	23.4	23.8	+ 6.4	- 1.7
Payroll (mil. \$)	\$209.4	\$175.2	\$134.6	+19.5	+30.2
Value added by manufacture (mil.\$)##	409.8	305.7	251.5	+34.1	+21.6
Value of industry shipments (mil.\$)###	747.6	648.9	544.6	+15.2	+19.2
Capital expenditures, new (mil. \$)	21.9	14.5	7.0	+51.0	+107.1

Robes & Dressing Gowns (SIC 2384*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	136	171	--	-20.5%
Number of establishments, total**	129#	152	179	-15.1%	-15.1
Employees, total (thous.)	10.4	9.6	10.0	+ 8.3	- 4.0
Production workers (thous.)	8.9	8.3	8.5	+ 7.2	- 2.4
Payroll (mil.\$)	\$ 74.0	\$ 65.1	\$ 50.0	+13.6	+30.2
Value added by manufacture (mil. \$)##	191.9	141.9	92.5	+35.2	+53.4
Value of industry shipments (mil.\$)###	373.7	293.6	202.8	+27.3	+44.8
Capital expenditures, new (mil. \$)	1.6	3.3	2.0	-51.5	+65.0

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2341 - This industry comprises establishments primarily engaged in manufacturing women's, misses', children's and infants' underwear and nightwear cut and sewed from purchased woven or knit fabric.

SIC 2342 - This industry comprises establishments primarily engaged in manufacturing brassieres, girdles, corsets, corset accessories, and allied garments.

SIC 2254 - This industry comprises establishments primarily engaged in knitting underwear and nightwear from yarn or in manufacturing underwear and nightwear from knit fabric produced in the same establishments. Industry figures include underwear and nightwear for both men and women as well as for children and infants.

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

SIC 2384 - This industry comprises establishments primarily engaged in manufacturing men's and women's robes and dressing gowns.

**Each business location is counted as a separate establishment.

#Covers establishments with paid employees, only, as reported in County Business Patterns.

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b., plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales).

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977;
Annual Survey of Manufactures, 1978,
County Business Patterns, 1978.

Employment & Earnings

Current information on employment and earnings in segments of the women's inner fashion industry is published by the U.S. Bureau of Labor Statistics. According to this source all of the innerwear categories measured declined in employment in 1980 compared to 1979. The number of employees in the brassiere and allied garment industry fell the most, 5.9%. However, average weekly earnings of production workers in the three inner fashion industries covered rose during this same period.

In the first three months of 1981, the trend toward lower total employment and higher production worker earnings continued in the women's & children's underwear and brassiere and allied garments industries, when compared to the same 1980 period. The knit underwear segment reversed this trend by registering a 1.6% increase in total employment for the first quarter of 1981 over the first quarter of 1980.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment & Earnings in Selected Women's Inner Fashion Industries

	Jan.-March Avg.			Annual Average		
	1981	1980	% Change 1981/1980	1980	1979	% Change 1980/1979
Knit underwear mills:						
All employees (thous.)	32.3	31.8	+ 1.6%	32.0	32.3	- 0.9%
Production workers (thous.)	28.0	27.6	+ 1.4	27.7	27.9	- 0.7
Average weekly earnings	\$176.3	\$168.1	+ 4.9	\$168.2	\$147.2	+14.3
Average weekly hours	36.5	37.2	- 1.9	36.8	36.0	+ 2.2
Average overtime hours	1.2	1.6	-25.0	1.5	1.2	+25.0
Women's & children's underwear:						
All employees (thous.)	70.1	72.4	- 3.2%	72.0	73.3	- 1.8%
Production workers (thous.)	61.0	62.7	- 2.7	62.4	63.3	- 1.4
Average weekly earnings	\$158.2	\$148.0	+ 6.9	\$148.5	\$135.7	+ 9.4
Average weekly hours	36.1	36.5	- 1.1	36.3	35.8	+ 1.4
Average overtime hours	1.0	1.1	- 9.1	1.1	1.1	--
Women's brassieres & allied garments:						
All employees (thous.)	17.5	18.1	- 3.3%	17.6	18.7	- 5.9%
Production workers (thous.)	13.7	14.3	- 4.2	13.8	14.9	- 7.4
Average weekly earnings	\$165.5	\$149.9	+10.4	\$151.9	\$146.2	+ 3.9
Average weekly hours	35.5	34.4	+ 3.2	34.6	35.4	- 2.3
Average overtime hours	1.0	0.9	+11.1	0.9	0.9	--

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

Concentration in the Industry

Lingerie, loungewear and foundation garment producers are mainly small firms with fewer than 100 employees, which generally represent a very small percentage of total industry employment. Larger firms are mainly to be found in the knit underwear segment, in which 16.7% of the firms have more than 500 employees—up from 1972's 16.1%. These firms employ 65.5% of the workers. In contrast, in the robe and dressing gown segment, 76.7% of the plants had fewer than 100 employees, and these plants accounted for between 32% and 42% of all employment.

In 1980, 94% of total shipments were accounted for by plants with 100 or more employees in the knit underwear mill industry. Brassieres and allied garments and women's and children's underwear had 89% and 87% of their shipments credited to these same plants, respectively. The robe and dressing gown segment showed a significantly lower 69% concentration of shipments from plants with 100 or more employees during the same period.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The Women's Inner Fashion Industry by Employment Size, 1978

	Establishments		Employees		Annual Payroll	
	Number	%	Number (thous.)	%	Mil. \$	%
Women's & children's under- wear industry, total	638	100.0%	72.9	100.0%	\$528.7	100.0%
By establishment size:						
Under 20 employees	190	29.8	D	--	D	--
20 to 49 employees	117	18.3	3.9	5.3	30.8	5.8
50 to 99 employees	103	16.1	7.7	10.6	52.7	10.0
100 to 249 employees	141	22.1	22.6	31.0	163.1	30.8
250 to 499 employees	69	10.8	24.5	33.6	165.5	31.3
500 or more employees	18	2.8	D	--	D	--
Brassiere & allied garment industry, total	169	100.0	18.6	100.0	\$152.3	100.0
By employment size:						
Under 20 employees	44	26.0	D	--	D	--
20 to 49 employees	44	26.0	1.5	8.1	14.1	9.3
50 to 99 employees	27	16.0	2.0	10.8	16.2	10.6
100 to 249 employees	34	20.1	5.1	27.4	36.4	23.9
250 to 499 employees	12	7.1	4.2	22.6	29.2	19.2
500 or more employees	8	4.7	5.3	28.5	52.5	34.5
Knit underwear mills, total	96	100.0	28.7	100.0	\$225.2	100.0
By establishment size:						
Under 20 employees	12	12.5	D	--	D	--
20 to 49 employees	14	14.6	0.5	1.7	5.1	2.3
50 to 99 employees	18	18.8	1.3	4.5	9.5	4.2
100 to 249 employees	25	26.1	3.9	13.6	28.2	12.5
250 to 499 employees	11	11.5	D	--	D	--
500 or more employees	16	16.7	18.8	65.5	153.0	67.9
Robes & dressing gowns, total	129	100.0	9.2	100.0	74.2	100.0
By establishment size:						
Under 20 employees	43	33.3	D	--	D	--
20 to 49 employees	32	24.8	1.1	12.0	10.2	13.7
50 to 99 employees	24	18.6	1.8	19.6	12.4	16.7
100 to 249 employees	23	17.8	3.3	35.9	25.2	34.0
250 to 499 employees	6	4.7	2.2	23.9	17.7	23.9
500 or more employees	1	0.8	D	--	D	--

na = not available

D = withheld to avoid disclosure

Source: U.S. Bureau of the Census,
County Business Patterns, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Concentration in the Industry by Company Size, 1977

	<u>Companies</u>	<u>Plants</u>	<u>Employees</u>	<u>Sales & Receipts (Mil. \$)</u>
Women's & children's undergarment manufacturers, total	660	1,002	82,969	\$2,159.2
Percent	100.0%	100.0%	100.0%	100.0%
4 largest companies	0.6	9.4	16.9	15.8
8 largest companies	1.2	13.1	23.5	24.3
20 largest companies	3.0	20.0	38.8	39.1
50 largest companies	7.6	31.7	59.6	60.0
Other companies	93.4	68.3	40.4	40.0

Source: U.S. Bureau of the Census,
General Report On Industrial Organization
Enterprise Statistics, 1977.

Operating Ratios

Key Business Ratios in the Women's Inner Fashion Industry, 1980 (Median Results)

	<u>Knit Underwear Mills</u>	<u>Women's & Children's Underwear</u>	<u>Bras & Allied Garments</u>	<u>Robes & Dressing Gowns</u>
Number of manufacturers reporting	18	130	23	41
Current assets to current debt (times)	2.57	1.71	2.56	1.62
Net profits to net sales (percent)	6.79	1.75	1.26	1.85
Net profits to net worth (percent)	27.39	13.43	3.98	18.91
Net sales to net worth (times)	3.44	6.97	3.94	7.39
Net sales to net working cap. (times)	4.25	7.54	4.13	7.33
Average collection period (days)	36	45	52	40
Net sales to inventory (times)	5.5	7.4	4.3	7.7

Source: Dun & Bradstreet, Inc.
Business Economics Division,
1980 Key Business Ratios,
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By Region

The Middle Atlantic region remains the main area in which women's and children's innerwear plants are located. New York accounted for the major share of plants in 1977 with 36.9% of the total, followed by Pennsylvania and New Jersey with 12.8% and 5.4%, respectively. Combined, these three states contained 619 of the industries 1,122 plants (55.2%).

The leading states in employment were New York, Pennsylvania and Georgia, accounting for 32.5% of the industries 126.6 thousand employees.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's Inner Fashion Industry
By Geographic Region & Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or more Employees	Thousands	% of total**
Knit underwear mills (SIC 2254*)				
Total U.S.	92	74	25.2	100.0%
Middle Atlantic				
New York	14	9	1.0	4.0
Pennsylvania	34	29	4.5	17.9
South Atlantic				
North Carolina	14	10	4.7	18.7
Georgia	3	3	1.0	4.0
East South Central				
Mississippi	4	4	1.4	5.6
Women's & children's underwear (SIC 2341*)				
Total U.S.	698	479	72.9	100.0%
New England				
Massachusetts	22	15	1.9	2.6
Connecticut	10	8	0.4	0.5
Middle Atlantic				
New York	266	132	8.8	12.1
New Jersey	37	21	2.0	2.7
Pennsylvania	83	69	8.2	11.2
North Central				
Indiana	4	4	0.2	0.3
Illinois	8	3	1.0	1.4
South Atlantic				
Virginia	12	11	2.3	3.2
South Carolina	11	11	2.5	3.4
Georgia	25	25	6.5	8.9
South Central				
Mississippi	14	14	3.7	5.1
Arkansas	5	5	0.7	1.0
Texas	13	10	3.0	4.1
Mountain				
Arizona	6	5	1.1	1.5
Pacific				
California	40	20	2.3	3.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's Inner Fashion Industry
By Geographic Region & Leading States, 1977 (continued)

	Number of Establishments		Employees	
	Total	20 or more Employees	Thousands	% of total**
Brassieres & allied garments (SIC 2342*)				
Total U.S.	180	116	18.9	100.0%
New England				
Massachusetts	7	3	0.5	2.6
Connecticut	11	8	0.7	3.7
Middle Atlantic				
New York	66	34	3.8	20.1
New Jersey	14	6	1.4	7.4
Pennsylvania	16	13	1.4	7.4
North Central				
Illinois	6	4	0.3	1.6
South Atlantic				
Georgia	8	7	2.5	13.2
South Central				
Texas	8	7	2.0	10.6
Pacific				
California	14	10	1.9	10.1
Robes & dressing gowns (SIC 2384*)				
Total U.S.	152	99	9.6	100.0%
Middle Atlantic				
New York	68	42	3.2	33.3
New Jersey	10	6	na	--
Pennsylvania	11	9	na	--
South Atlantic				
South Carolina	10	10	1.7	17.7
Georgia	5	4	0.3	3.1
Florida	5	4	0.5	5.2

na = not available

*For SIC definition see page 3.

**States with information withheld due to disclosure are not shown therefore percent distribution does not equal 100.0%.

Source: U.S. Bureau of the Census, Census of
Manufactures, 1977, Industry Series
MC77-1-22B; MC77-1-23C; MC77-1-23D.

PRODUCTION

The latest available official source on production of selected types of women's inner fashions is the Current Industrial Report (CIR) annual report issued by the Census Bureau. The CIR information is based on a sample of apparel manufacturers and thus is not as comprehensive as the 1977 Census of Manufactures. However, the CIR does indicate trends.

Excluded from the CIR surveys are many small apparel firms which are included in the census of manufactures, where data is obtained for these firms from administrative records of other government agencies. These companies accounted for 3.1% of total value of shipments of industries covered by the apparel survey and 1.5% of those covered by the brassiere, corset and allied garment survey.

According to the CIR, total women's innerwear and nightwear production declined by 6.7% from its 1978 level in 1979. The largest production declines were registered by pajamas, except robe sets, down 30.4% and separate bed jackets & peignoirs, except lounge robes, off 21.6% from their 1978 levels.

The only categories to register increases in 1979 were union suits, camisoles, thermal underwear, etc., full-length slips, and half-length slips. Production of these groups rose 37.8%, 5.5% and 2.5%, respectively.

Total production of reported categories of foundation items increased in 1980, up 1.4% although the girdles, corsets, combinations and accessories group continued to decline (-8.4%). This drop in production was offset by the 4.0% increase in production of brassieres in 1980.

Production of Reported Categories of Women's Innerwear
& Nightwear, 1979, 1978
(Thousands of Units)

	<u>1979</u>	<u>1978</u>	<u>% Change 1979/1978</u>
Innerwear & Nightwear, total	667,404	715,200	- 6.7%
Women's, misses' & juniors':			
Full-length slips	47,220	44,748	+ 5.5
Half-slips, exc. pettipants	36,096	35,208	+ 2.5
Panties, incl. pettipants	392,424	428,184	- 8.4
Union suits, camisoles, thermal underwear, etc.	21,840	15,852	+37.8
Nightgowns & sleepcoats, exc. sets with robes	98,184	108,024	- 9.1
Pajamas, exc. sets with robes	20,580	29,568	-30.4
Peignoir & robe sets with nightgown or pajamas	21,144	21,480	- 1.6
Separate bedjackets & peignoirs, exc. lounge robes	2,892	3,690	-21.6
Robes, dressing gowns, housecoats, etc.	27,024	28,536	- 5.3

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A (79-1).

PRODUCTION

Production of Reported Categories of Women's Foundation Garments, 1978-1980 (Thousands of Units)

	1980	1979	1978	% Change 1980/1979	% Change 1979/1978
Foundations, total	169,506	167,136	166,632	+ 1.4%	+ 0.3%
Brassieres	141,612	136,176	133,872	+ 4.0	+ 1.7
Girdles, corsets, combinations & accessories	28,344	30,960	32,760	- 8.4	- 5.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles, and Allied Garments,
MA-23J(80)-1, MA-23J(79)-1.

Additional information on women's inner fashions and nightwear production is available from the National Cotton Council's Cotton Counts Its Customers. This source covers some items not included in the Census Bureau reports, as well as preliminary figures for 1980.

Production of Women's, Misses' & Juniors' Inner Fashions & Nightwear 1978-1980 (Thousands of Units)

	Production		
	1980(p)	1979(r)	1978(r)
Women's, misses' & juniors:			
Nightwear, incl. bedjackets & robe sets	143,100	142,800	163,032
Knit	94,176	92,712	98,664
Separate bedjackets	1,812	1,872	2,712
Nightgowns & sleepcoats	65,100	62,844	65,352
Pajamas	10,284	10,488	12,912
Peignoir & robe sets with nightgown & pajamas	16,980	17,508	17,688
Woven	49,248	50,088	64,368
Separate bedjackets	984	1,020	1,248
Nightgowns & sleepcoats	35,052	35,340	42,672
Pajamas	9,684	10,092	16,656
Peignoir & robe sets with nightgowns or pajamas	3,528	3,636	3,792
Robes, dressing gowns & housecoats	27,840	27,024	28,536
Knit	11,700	11,184	11,688
Tufted	2,136	2,244	2,364
Woven	14,004	13,596	14,484

(continued)

PRODUCTION

Production of Women's, Misses' & Juniors' Inner Fashions & Nightwear 1978-1980 (Thousands of Units) (continued)

	Production		
	1980(p)	1979(r)	1978(r)
Underwear	509,616	497,580	523,992
Knit	469,392	452,196	455,556
Panties & pettipants	384,264	370,944	383,976
Petticoats & half-slips	28,116	28,116	26,856
Full-length slips	32,064	31,440	29,772
Vests, camisoles, union suits, etc.	24,948	21,696	14,952
Woven	40,224	45,384	68,436
Panties & pettipants	16,008	21,480	44,208
Petticoats & half-slips	7,980	7,980	8,352
Full-length slips	16,092	15,780	14,976
Vests, camisoles, union suits, etc.	144	144	900

(p) = preliminary

(r) = revised

Source: National Cotton Council of America,
Cotton Counts Its Customers,
1981 Edition.

By Fabric/Construction

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1978, 1979

	1979	1978	% Change in Units 1979/1978
Full-length slips (thous. of units)	47,220	44,748	+ 5.5%
By Construction:			
Woven fabric	31.7%	32.1%	+ 4.3
Knit fabric	63.3	63.8	+ 4.6
Construction, n.s.k.	5.0	4.1	+ 28.7
By Fabric:			
All cotton & chiefly cotton	10.5	10.6	+ 4.3
All man-made & chiefly man-made	73.3	75.2	+ 2.9
All other fabric	10.1	7.7	+ 38.4
Fabric, n.s.k.	6.1	6.3	+ 2.7
Half-slips, exc. pettipants (thous. of units)	36,096	35,208	+ 2.5
By Construction:			
Woven fabric	18.6%	20.7%	- 7.7
Knit fabric	65.7	66.7	+ 1.0
Construction, n.s.k.	15.7	12.6	+ 27.6
By Fabric:			
All cotton & chiefly cotton	1.3	2.0	- 31.0
All man-made & chiefly man-made	82.7	84.3	+ 0.6
Fabric, n.s.k.	15.9	13.7	+ 19.2

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Women's Innerwear & Nightwear
By Fabric & Construction, 1978, 1979
(continued)

	1979	1978	% Change in Units 1979/1978
Panties, inc. pettipants (thous. of units)	392,424	428,184	- 8.4%
By Construction:			
Woven fabric	5.1%	9.4%	- 50.4
Knit fabric	88.0	81.9	- 1.4
Construction, n.s.k.	6.9	8.7	- 27.9
By Fabric:			
All cotton & chiefly cotton	22.5	19.2	+ 7.4
All man-made & chiefly man-made	73.9	71.2	- 4.9
Fabric, n.s.k.	3.6	9.6	- 65.5
Union suits, camisoles, thermal underwear, etc. (thous. of units)	21,840	15,852	+ 37.8
By construction:			
Woven fabric	0.6%	5.3%	- 84.3
Knit fabric	93.7	87.7	+ 47.2
By fabric:			
All cotton & chiefly cotton	25.7	36.2	- 2.1
All man-made & chiefly man-made	51.8	50.2	+ 42.1
All other fabric	4.5	4.1	+ 53.7
Fabric, n.s.k.	18.0	9.5	+159.5
Nightgowns & sleepcoats, exc. sets with robes (thous. of units)	98,184	108,024	- 9.1
By Construction:			
Woven fabric	36.0%	39.5%	- 17.2
Knit fabric	64.0	60.5	- 3.8
By Fabric:			
All cotton & chiefly cotton	12.4	12.5	- 9.9
All man-made & chiefly man-made	87.2	86.9	- 8.8
All other fabric	0.4	6.0	- 35.2
Pajamas, exc. sets with robes (thous. of units)	20,580	29,568	- 30.4
By construction:			
Woven fabric	44.1%	52.2%	- 41.8
Knit fabric	45.8	40.9	- 22.0
Construction, n.s.k.	10.0	6.3	+ 11.0
By Fabric:			
All cotton & chiefly cotton	22.8	19.5	- 18.7
All man-made & chiefly man-made	66.5	73.1	- 36.7
All other fabric	10.7	7.3	+ 1.1

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Women's Innerwear & Nightwear
By Fabric & Construction, 1978, 1979
 (continued)

	<u>1979</u>	<u>1978</u>	<u>% Change in Units</u> <u>1979/1978</u>
Peignoir & robe sets with nightgown or pajamas, (thous. of units)	21,144	21,480	- 1.6%
By construction:			
Woven fabric	16.2%	16.9%	- 5.3
Knit fabric	78.2	78.7	- 2.1
Construction, n.s.k.	5.6	4.5	+ 22.5
By fabric:			
All cotton & chiefly cotton	0.8	1.8	- 57.6
All man-made & chiefly man-made	90.7	90.2	- 1.0
All other fabric	3.6	3.5	--
Fabric, n.s.k.	5.4	4.4	+ 21.5
Separate bedjackets and peignoirs, exc. lounge robes (thous. of units)	2,892	3,690	- 21.6
By construction:			
Woven fabric	35.3%	31.5%	- 18.3
Knit fabric	64.7	68.5	- 31.0
By fabric:			
All cotton & chiefly cotton	32.3	25.5	- 7.1
All man-made & chiefly man-made	67.6	74.5	- 33.7
Robes, dressing gowns & housecoats, etc. (thous. of units)	27,024	28,536	- 5.3
By construction:			
Woven fabric	21.1%	26.3%	- 24.0
Knit fabric	26.1	18.3	+ 34.9
Construction, n.s.k.	52.8	55.4	- 9.7
By fabric:			
All cotton & chiefly cotton	5.2	4.5	+ 8.4
All man-made & chiefly man-made	45.0	34.8	+ 22.6
Fabric, n.s.k.	49.8	60.7	- 22.3

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
 Current Industrial Reports,
Apparel MA-23A(79)-1.

PRODUCTION

Materials Consumed in Production

The 1977 Census of Manufactures contains the most complete information available on materials consumed in the manufacture of specified innerwear fashions, as noted below.

Materials Consumed in the Production of Women's Inner Fashions & Nightwear, 1972, 1977

	Delivered Cost (Million \$)		% Change 1977/1972
	1977	1972	
Knit underwear mills (SIC 2254*)			
Materials, containers & supplies	\$325.8	\$208.8	+ 56.0%
Knitted fabrics, purchased	7.5	16.4	- 54.3
Carded cotton yarns	94.5	51.5	+ 83.5
Combed cotton yarns	40.7	38.9	+ 4.6
Man-made fiber yarn, filament & spun	34.4	46.4	- 25.9
All other yarns	25.7	14.0	+ 83.6
All other materials, containers & supplies, incl. n.s.k.	123.0	41.6	+195.7
Women's & children's underwear (SIC 2341*)			
Materials, containers & supplies	659.8	503.3	+ 31.1
Broad woven fabrics	142.0	111.4	+ 27.5
Purchased knitted fabrics, incl. transfers from other plants of the same company	234.1	248.6	- 5.8
All other materials, containers & supplies including n.s.k.	283.7	143.3	+ 98.0
Brassieres & allied garments (SIC 2342*)			
Materials, containers & supplies	225.1	230.4	- 2.3
Broad woven fabrics	66.9	96.0	- 30.3
Purchased knitted fabrics, incl. transfers from other plants of the same company	87.6	49.7	+ 76.3
All other materials, containers & supplies including n.s.k.	70.6	84.7	- 16.6
Robes & dressing gowns (SIC 2384*)			
Materials, containers & supplies	119.3	77.9	+ 53.1
Broad woven fabrics	77.4	54.1	+ 43.1
Purchased knitted fabrics, incl. transfers from other plants of the same company	20.8	7.1	+193.0
All other materials, containers & supplies including n.s.k.	21.1	16.7	+ 26.3

n.s.k. = not specified by kind

*For SIC definition see page 3.

Source: U.S. Bureau of the Census, Census of
Manufactures, Industry Series, MC77-22B;
MC77-23C; MC77-1-23D.

SHIPMENTS

Based on a representative sample of manufacturers, the Census Bureau reports that shipments of women's inner fashions, by all producers, including underwear, nightwear, brassieres and loungewear came to \$2,347.2 million in 1979, an increase of 16% from the 1978 level of \$2,024.3.

Value of Shipments of Reported Women's Inner Fashions, 1978, 1979

	1979 (mil. \$)	1978 (mil. \$)	% Change of Shipments from 1978
Women's, misses' & juniors' underwear/nightwear	\$1,574.0	\$1,527.1	+ 3.1
Full-length slips	192.6	169.2	+13.8
Half-slips, exc. pettipants	100.3	88.1	+13.8
Panties, incl. pettipants	297.1	295.2	+ 0.6
Union suits, camisoles & thermal underwear, etc.	59.0	38.3	+54.0
Nightgowns & sleepcoats, exc. sets with robes	456.3	450.7	+ 1.2
Pajamas, exc. sets with robes	92.0	125.0	-26.4
Peignoir & robe sets with nightgown or pajamas	132.3	117.0	+13.1
Separate bedjackets & peignoirs, exc. lounge robes	18.3	20.4	-10.3
Robes, dressing gowns & housecoats, etc.	226.1	223.2	+ 1.3

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79)-1.

Total shipments of brassieres, girdles and allied garments during 1980 were valued at \$829.2 million, compared with 1979 shipments of \$773.2 million, an increase of 7.2%. Brassiere shipments were valued at \$634.6 million, an increase of 8.6%. Shipments of girdles, corsets and other foundation garments during 1980 were valued at \$194.6 million, an increase of 3.2%. Puerto Rican shipments of brassieres increased 10.9%. Puerto Rican shipments of girdles rose from \$41.6 million in 1979 to \$55.9 million in 1980, an increase of 34.4%.

Value of Shipments of Foundation Garments 1979, 1980

	1980 (mil. \$)	1979 (mil. \$)	% Change 1980/1979
Brassieres, girdles & allied garments, total	\$929.2	\$773.2	+20.2%
Domestically produced	527.7	510.0	+ 3.5
Puerto Rican plants	301.5	263.2	+14.6
Brassieres, bandeaux & bra-lettes, total	634.6	584.4	+ 8.6
Domestically produced	389.0	362.8	+ 7.2
Puerto Rican plants	245.6	221.6	+10.8
Girdles and other foundation garments, total	194.6	188.8	+ 3.1
Domestically produced	138.7	147.2	- 5.8
Puerto Rican plants	55.9	41.6	+34.4

Source: U.S. Bureau of the Census, Current Industrial
Reports, Brassieres, Girdles, and Allied
Garments, MA-23J(80), July 1981.

SHIPMENTS

Unit shipments of women's innerwear by price line and type of garment, based on manufacturers reporting in this detail, are shown below. Since the number of manufacturers supplying the breakdowns by price and style varies from year to year, comparisons must be used with caution, to indicate a general trend rather than a measure of actual gains or losses.

Shipments of Women's Foundation Garments by Factory (Wholesale) Price Line, 1979, 1980

	1980	1979	% Change in Units 1980/1979
Strap bandeaux brassiere, regular (thous. of units)	141,888	141,816	+ 0.1%
Percent:	100.0%	100.0%	--
Under \$8.50 per dozen	D	1.8	na
\$8.51 to \$12.75 per dozen	D	4.4	na
\$12.76 to \$15.50 per dozen	15.1	14.5	+ 6.6
\$15.51 to \$19.25 per dozen	6.4	6.4	+ 2.7
\$19.26 to \$30.00 per dozen	18.7	20.7	- 7.9
\$30.01 & over per dozen	52.5	52.2	+ 2.7
Girdles (with opening) incl. latex (thous. of units)	8,880	8,844	+ 0.4
Percent:	100.0%	100.0%	--
Under \$36.00 per dozen	25.0	28.5	-11.9
\$36.01 to \$65.99 per dozen	54.1	44.2	+22.7
\$66.00 to \$95.99 per dozen	12.6	19.0	-33.6
\$96.00 & over per dozen	8.4	8.3	+ 1.6
Girdles (without opening), incl. those made of latex (thous. of units)	35,256	34,224	+ 3.0
Percent:	100.0%	100.0%	--
Under \$30.00 per dozen	42.5	47.9	- 8.5
\$30.01 to \$51.00 per dozen	27.1	20.4	+36.9
\$51.01 & over per dozen	30.4	31.7	- 1.4

D = Withheld to avoid disclosure

na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles and Allied Garments,
MA-23J(80)-1.

SHIPMENTS

Quantity of Shipments of Women's Foundation Garments by Type, 1979, 1980 (Thousands of Units)

	1980	1979	% Change 1980/1979
Brassieres & allied garments, total	268,044	259,068	+ 3.5%
Brassieres, bra-lettes & bandeaux	219,648	211,932	+ 3.6
Brassieres (with band 3" or more) excl. bra-lettes	7,308	6,804	+ 7.4
Bra-lettes (hip-length with garters), incl. briefers	564	660	-14.5
Bandeaux (with less than 3" bands)	211,776	204,468	+ 3.6
Strap, regular	141,888	141,816	+ 0.1
Strap, padded or contour-lined	57,780	51,228	+12.8
Strapless or convertible	12,108	11,424	+ 6.0
Corsets	96	72	+33.3
Girdles	44,136	43,068	+ 2.5
Girdles (with opening), incl. those made of latex	8,880	8,844	+ 0.4
Girdles (without opening), incl. those made of latex	35,256	34,224	+ 3.0
Combination & one-piece garments (corselets)	2,256	2,736	-17.5
Maternity foundation garments (incl. corselets & combination)	588	600	- 2.0
Garter belts	1,320	1,200	+10.0

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles and Allied Garments
MA-23J(80)-1.

By Leading States

New York State and Pennsylvania each held the largest share of 1977 product shipments in three of the eight categories of women's inner fashions covered by the Census Bureau. The highest share for New York was in the corsets, girdles, combinations and accessories group, where it was responsible for 34.8% of total shipment value while the 31.8% concentration registered by Pennsylvania in the contract work on brassieres, corsets and allied garments was its largest. North Carolina led all states in shipment value of women's and children's knit underwear as Georgia led in the brassieres, bra-lettes and bandeaux segment.

SHIPMENTS

By Leading States (continued)

Value of Shipments of Women's Inner Fashions by Leading States, 1972, 1977

	Value of Shipments (Million \$)		% Change 1977/1972
	1977	1972	
Women's & children's knit underwear			
United States, total	\$ 95.4	\$ 73.0	+ 30.7%
Leading States:			
North Carolina	39.5	na	--
Pennsylvania	23.9	25.9	- 7.7
New York	7.7	na	--
Leading States, total	71.1	--	--
Percent of U.S. total	74.5%	--	--
Women's & children's knit underwear			
United States, total	50.0	45.9	+ 8.9
Leading States:			
Pennsylvania	14.1	na	--
Percent of U.S. total	28.2%	--	--
Women's, misses', children's & infants' underwear			
United States, total	585.8	416.7	+ 40.6
Leading States:			
New York	142.1	147.1	- 3.4
Georgia	60.0	38.2	+ 57.1
North Carolina	59.8	53.7	+ 11.4
Pennsylvania	49.7	30.2	+ 64.6
New Jersey	34.4	9.8	+251.0
Mississippi	33.4	24.4	+ 36.9
California	28.1	na	--
Texas	15.0	2.9	+417.2
Oklahoma	12.6	na	--
Illinois	7.2	na	--
Leading States, total	442.3	--	--
Percent of U.S. total	75.5%	--	--
Women's, misses', children's & infants' nightwear			
United States, total	852.2	597.5	+ 42.6
Leading States:			
New York	206.6	164.1	+ 25.9
North Carolina	114.8	67.2	+ 70.8
Pennsylvania	53.7	78.3	- 31.3
South Carolina	49.5	na	--
California	42.4	na	--
Massachusetts	21.6	na	--
Georgia	21.6	17.5	+ 23.4
New Jersey	20.2	22.1	- 8.6
Mississippi	19.9	na	--
Leading States, total	550.3	--	--
Percent of U.S. total	64.6%	--	--

(continued)

SHIPMENTS

By Leading States (continued)

Value of Shipments of Women's Inner Fashions by Leading States, 1972, 1977
(continued)

	Value of Shipments (Million \$)		% Change 1977/1972
	1977	1972	
Contract work on women's, misses & children's underwear & nightwear			
United States, total	\$247.1	na	--
Leading States:			
Pennsylvania	33.4	na	--
North Carolina	31.5	na	--
New York	20.2	na	--
Georgia	12.2	na	--
Virginia	11.0	na	--
Massachusetts	7.4	na	--
New Jersey	3.6	na	--
California	2.3	na	--
Leading States, total	121.6	--	--
Percent of U.S. total	49.2%	--	--
Brassieres, bra-lettes & bandeaux			
United States, total	346.1	385.1	- 10.1%
Leading States:			
Georgia	88.0	na	--
New York	81.9	120.5	- 32.0
California	27.0	na	--
Pennsylvania	4.5	1.1	+309.1
Connecticut	3.7	na	--
Leading States, total	205.1	--	--
Percent to U.S. total	59.3%	--	--
Corsets, girdles, combinations & accessories			
United States, total	153.3	236.7	- 35.2
Leading States:			
New York	53.4	90.6	- 41.1
Pennsylvania	17.0	8.3	+104.8
Connecticut	9.7	9.8	- 1.0
California	8.0	12.7	- 37.0
Texas	7.9	na	--
Leading States, total	96.0	--	--
Percent to U.S. total	62.6%	--	--
Contract work on brassieres, corsets, & allied garments			
United States, total	23.6	na	--
Leading States:			
Pennsylvania	7.5	na	--
Percent to U.S. total	31.8%	--	--

na = not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCER PRICE TRENDS

Producer (factory) prices for all women's wear rose an average of 7.0% in 1980 over 1979. Of the specified women's inner fashion and sleepwear items reported, the women's corsets and girdles category was the only one to register a decline, (-15.4%). In the two year period between 1978 and 1980, women's slips increased 21.1% at the wholesale level, more than any other category.

Producer Price Indexes of Selected Types of
Women's Inner Fashions 1978-1980
(1967 = 100 unless specified)

	1980	1979	1978	% Change 1980/1979	% Change 1980/1978
Apparel	172.4	160.4	152.4	+ 7.5%	+13.1%
Women's wear	150.4	140.5	134.0	+ 7.0	+12.2
Brassieres	180.4	168.8	161.9	+ 6.9	+11.4
Corsets & girdles	115.8	136.4	129.7	-15.1	-10.7
Panties**	124.0	113.7	103.7	+ 9.1	+19.6
Slips**	125.2	115.2	103.4	+ 8.7	+21.1
Nightgowns & sleepcoats	133.3	129.4	118.1	+ 3.0	+12.9
Robes, dressing gowns, etc.**	114.1	107.4	101.1*	+ 6.2	+12.9

*June to December Average

**December 1977 = 100

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The U.S. imported \$237.5 million worth of women's and children's inner fashions and nightwear in 1980, a gain of 18.6% over 1979's total of \$200.3 million. Both figures are C.I.F. value (see footnotes on following table), as measured by the Census Bureau. On a quantity measurement, imports of women's inner fashions were 18.1 million dozen. This represents an increase of over 13.7% over the 15.9 million dozen imported in 1979.

U.S. imports of dressing gowns and robes, not knit, rose 65.2% in value (\$10.9 million) in 1980 versus 1979. Cotton dressing gowns and robes accounted for most of this increase with an 82.9% gain in import value of \$6.4 million versus the 1979 value of \$3.5 million.

Imported undergarments, not specified by kind, rose overall 25.1% spurred by a 35.5% rise in the value of knit textile garments.

Only one category of imported women's & children's innerwear and nightwear declined in both a quantity and value basis in 1980 compared to 1979. Non-knit cotton pajama imports were 8.2% in dollar value and 16.3% in unit volume.

(continued)

FOREIGN TRADE

Imports (continued)

According to the U.S. Department of Commerce, the ratio of nightwear imports to U.S. production is more than 32%. This places this product in the "import sensitive" category.

The top four countries which exported these goods to the United States in 1980 were Mexico, Hong Kong, the Phillipines and the Dominican Republic. These four countries, with \$123.5 million worth of exports to the U.S., represented 52% of U.S. imports.

Summary of U.S. Imports of Women's & Children's Innerwear
& Nightwear, 1979, 1980

	Quantity (thous. of doz.)		% Change 1980/1979	Value C.I.F.* (mil. of \$)		% Change 1980/ 1979
	1980	1979		1980	1979	
Total, all reported categories	18,074.8	15,902.8	+ 13.7%	\$237.5	\$200.3	+18.6%
Brassieres, total	12,065.5	11,156.1	+ 8.1	146.3	127.2	+15.0
Cotton	137.4	186.0	- 26.1	1.5	1.8	-16.7
Man-made	11,925.0	10,963.0	+ 8.8	144.7	125.2	+15.6
Textile materials, excl. cotton and man-made	3.1	7.1	- 56.3	0.1	0.2	-50.0
Corsets, garters & other body-supporting garments, total	na	na	--	11.0	8.5	+29.4
Undergarments, n.s.k., total	5,583.5	4,367.8	+ 27.8	60.4	48.3	+25.1
Textile material, not knit	926.7	931.8	- 0.5	29.1	25.2	+15.5
Textile material, knit	4,656.8	3,436.0	+ 35.5	31.3	23.1	+35.5
Pajamas, cotton, not knit, total	232.4	277.8	- 16.3	8.9	9.7	- 8.2
Dressing gowns & robes, not knit, total	193.4	101.1	+ 91.3	10.9	6.6	+65.2
Cotton	135.4	63.3	+113.9	6.4	3.5	+82.9
Wool or Man-made	56.4	36.8	+ 53.3	3.9	2.8	+39.3
Silk	1.6	1.0	+ 60.0	0.6	0.3	+100.0

na = not available

n.s.k. = not specified by kind

* = the C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT 135, December 1979, 1980.

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Innerwear & Nightwear
By Leading Countries of Origin, 1979, 1980

	Quantity (thous. of doz.)		% Change 1980/1979	Value C.I.F.* (thous. of \$)		% Change 1980/1979
	1980	1979		1980	1979	
Brassieres, cotton total	137.4	186.0	- 26.1%	\$ 1,502	\$ 1,764	- 14.9%
Philippines	82.6	105.5	- 21.7	849	867	- 2.1
Haiti	25.0	16.8	+ 48.8	280	174	+ 60.9
Dominican Republic	19.1	28.0	- 31.8	213	310	- 31.3
Mexico	6.8	8.5	- 20.0	104	137	- 24.1
Brassieres, man-made, total	11,925.0	10,963.0	+ 8.8	144,678	125,155	+ 15.6
Philippines	3,224.8	2,759.8	+ 16.8	28,362	23,042	+ 23.1
Dominican Republic	1,540.9	1,523.6	+ 1.1	20,432	19,772	+ 3.3
Mexico	1,481.7	1,567.9	- 5.5	24,820	23,268	+ 6.7
Costa Rica	1,475.9	1,325.3	+ 11.4	17,494	14,372	+ 21.7
Corsets, garters & other body- supporting garments, total	--	--	--	10,991	8,547	+ 28.6
Mexico	--	--	--	6,275	4,702	+ 33.5
Haiti	--	--	--	1,190	992	+ 20.0
Costa Rica	--	--	--	756	556	+ 36.0
Nicaragua	--	--	--	607	111	+446.8
Knit undergarments, n.s.k., total	4,656.8	3,436.0	+ 25.5	31,255	23,147	+ 35.0
Hong Kong	2,444.4	1,947.9	+ 25.5	10,816	8,586	+ 26.0
Haiti	701.4	362.3	+ 93.6	3,861	2,563	+ 50.3
Mexico	413.3	403.1	+ 2.5	5,107	4,694	+ 8.8
Dominican Republic	232.5	68.8	+237.9	2,681	873	+207.1
Undergarments, not knit, n.s.k., total	926.7	931.8	- 0.5	29,125	25,248	+ 15.4
Hong Kong	327.3	431.3	- 24.1	12,421	14,285	- 13.0
Mainland China	136.6	192.6	- 29.1	3,178	3,268	- 2.8
Sri Lanka	108.3	43.6	+148.4	2,035	795	+156.0
Taiwan	47.9	20.3	+136.0	1,848	531	+248.0
Pajamas, cotton, not knit, total	232.4	277.8	- 16.3	8,890	9,719	- 8.5
Hong Kong	182.6	248.9	- 26.6	6,939	8,593	- 19.2
Taiwan	18.4	4.5	+308.9	697	179	+289.4
Mainland China	16.4	--	--	625	--	--
Nicaragua	9.2	11.6	- 20.7	375	462	- 18.8
Dressing gowns & robes, cotton, not knit, total	135.4	63.3	+113.9	6,362	3,499	+ 81.8
Hong Kong	81.2	35.0	+132.0	3,068	1,419	+116.2
Macao	10.7	2.3	+365.2	374	77	+385.7
Dominican Republic	9.5	--	--	356	--	--
Haiti	6.9	2.5	+176.0	295	82	+259.8

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Innerwear & Nightwear
By Leading Countries of Origin, 1979, 1980 (continued)

	Quantity (thous. of doz.)		% Change 1980/1979	Value C.I.F.* (thous. of \$)		% Change 1980/1979
	1980	1979		1980	1979	
Dressing gowns & robes, wool or man-made, total	56.4	36.8	+ 53.3%	\$ 3,886	\$ 2,768	+ 40.4%
Republic of Korea	12.7	3.8	+234.2	564	146	+286.3
Mainland China	11.9	4.6	+158.7	793	247	+221.1
Hong Kong	9.3	4.1	+126.8	722	616	+ 17.2
Philippines	8.8	4.7	+ 87.2	718	416	+ 72.6
Dressing gowns & robes, silk, total	1.6	1.0	+ 60.0	593	300	+ 97.7
Hong Kong	1.3	0.4	+225.0	406	85	+377.6
Japan	0.2	0.2	--	68	78	- 12.8

*The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
 U.S. General Imports,
 Report FT 135,
 December 1979, 1980.

Summary of Imports & Apparent Consumption of
Women's Brassieres, Girdles & Allied Garments, 1980
 (Quantity in thous. of units; value in mil. \$)

	Imports for Consumption		Apparent Consumption*		% Imports to Apparent Consumption	
	Quantity	Value	Quantity	Value	Quantity	Value
Total	169,956	\$527.7	na	na	na	na
Brassieres	141,612	389.0	188,484	\$502.2	76.5%	36.5%
Girdles, corsets, combinations & accessories.	28,344	138.7	32,340	145.7	22.3	8.6

*Apparent Consumption is derived by subtracting exports from total manufacturers' shipments plus imports.

Source: U.S. Bureau of the Census,
 Current Industrial Reports,
 Brassieres, Girdles, and Allied Garments
 MA-23J(80)-1.

FOREIGN TRADE

Exports

In 1980, the U.S. exported over 14.2 million dozen of women's & children's innerwear and nightwear valued at \$142.4 million. This was a jump of 32.4% over the previous years exports of 10.8 million dozen, valued at \$120.2 million.

By far, the largest category expected in 1980 in the inner fashion sector was brassieres. This group accounted for 56.8% of the unit volume while representing 49.4% in terms of value.

The largest gain in terms of volume in 1980 was registered by the knit cotton pajamas and other nightwear group which climbed 127.3% to 30 thousand dozen. A close second was knit cotton underwear which captured a 120.7% gain.

The only two categories to register declines on both a unit and value measure were pantyhose, including tights, except cotton and pajamas and other nightwear.

Summary of Exports of Women's & Children's Innerwear &
Nightwear 1979, 1980

	Quantity (thous. of doz.)		% Change 1980/1979	Value F.A.S.* (thous. of \$)		% Change 1980/1979
	1980	1979		1980	1979	
Total, all reported categories	14,263.0	10,774.0	+ 32.4%	\$142,384	\$120,171	+ 18.5%
Brassieres, total	8,107.0	5,566.6	+ 45.6	70,289	59,781	+ 17.6
Cotton	889.6	274.9	+223.6	6,982	17,325	- 59.7
Man-made	5,468.1	3,200.0	+ 70.9	50,071	38,464	+ 30.2
Other materials	1,749.3	2,091.7	- 16.4	13,236	13,992	- 5.4
Underwear	3,794.5	2,911.1	+ 30.3	40,060	26,692	+ 50.1
Not knit						
Cotton	453.1	335.0	+ 35.3	2,921	1,345	+117.2
Man-made	537.8	229.0	+134.8	5,138	1,942	+164.6
Other materials	969.4	837.3	+ 15.8	11,020	6,904	+ 59.6
Knit						
Cotton	801.5	363.2	+120.7	6,654	5,108	+ 30.3
Man-made	763.5	926.1	- 17.6	10,116	9,031	+ 12.0
Other materials	269.2	220.5	+ 22.1	4,211	2,362	+ 78.3
Garters, garter belts & suspenders, total	277.5	157.2	+ 76.5	1,441	1,488	- 3.2
Pantyhose, (incl. tights, exc. cotton), total	1,313.6	1,506.5	-12.8	7,628	8,947	- 14.7
Body supporting garments, exc. brassieres	267.7	158.9	+ 68.5	5,661	5,104	+ 10.9

(continued)

FOREIGN TRADE

Exports (continued)

Summary of Exports of Women's & Children's Innerwear
& Nightwear, 1979, 1980
(continued)

	Quantity (thous. of doz.)		% Change 1980/1979	Value F.A.S.* (thous. of \$)		% Change 1980/1979
	1980	1979		1980	1979	
Pajamas & other nightwear	382.6	386.4	- 1.0%	\$ 10,920	\$ 13,279	- 17.8%
Not Knit						
Cotton	39.5	43.5	- 9.2	1,317	1,534	- 14.1
Wool	7.5	19.1	- 60.7	470	717	- 34.4
Man-made	113.7	108.4	+ 4.9	3,138	3,806	- 17.6
Other materials	32.8	55.8	- 41.2	1,169	1,485	- 21.3
Knit						
Cotton	30.0	13.2	+127.3	938	502	+ 86.9
Wool	7.1	11.4	- 37.7	240	400	- 40.0
Man-made	117.5	98.9	+ 18.8	3,167	3,463	- 8.5
Other materials	34.5	36.1	- 4.4	1,419	1,372	+ 3.4
Robes & dressing gowns	120.1	87.3	+ 37.6	6,385	4,880	+ 30.8
Not Knit						
Cotton	34.5	38.4	- 10.2	2,087	1,245	+ 67.6
Wool	3.6	2.1	+ 71.4	115	88	+ 30.7
Man-made	82.0	46.8	+ 75.2	4,183	3,547	+ 17.9

*The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports, FT 410
December 1980, 1979.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to the Census Bureau, the number of women in the U.S. 15 years of age and older will grow 16.0% by the year 2000. Women aged 35-44 will increase 61.4% by 2000 to more than 21 million, 19.9% of females 15 and over. The next largest increase is in the 45-54 year old group, which is expected to rise 55.7% to 18.3 million women. During the same time span, women aged 15-34 are expected to decline in numbers with the biggest decrease (21.5%) in the 20-24 year old age bracket.

THE POTENTIAL MARKET

Female Population of the U.S., 1980 & Projections to 2000* (In Thousands)

	1980	1985	2000	% Change 2000/1980	Percent of Female Population		
					1980	1985	2000
Total, all ages	116,472	119,514	133,790	+ 14.9%	100.0%	100.0%	100.0%
Under 15 years	25,069	25,203	27,785	+ 10.8	21.5	21.1	20.8
15 years & older	91,403	94,311	106,005	+ 16.0	78.5	78.9	79.2
15-19 years	10,410	8,857	9,658	- 7.2	8.9	7.4	7.2
20-24 years	10,652	10,192	8,360	- 21.5	9.1	8.5	6.2
25-34 years	18,698	20,034	17,326	- 7.3	16.1	16.8	12.9
35-44 years	13,063	16,002	21,084	+ 61.4	11.2	13.4	15.8
45-54 years	11,789	11,542	18,356	+ 55.7	10.1	9.7	13.7
55-64 years	11,549	11,390	12,116	+ 4.9	9.9	9.5	9.1
65 years & older	15,242	16,293	19,103	+ 25.3	13.1	13.6	14.3
Median age (in years)	31.3	32.7	36.8				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports, PC80-S1-1; Current Population Reports, Series P-25, No. 714 (July 1977).

RETAIL SALES BY STORE TYPE

The only official information on sales of women's inner fashions and loungewear in specified types of retail outlets is contained in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports and not all store types are required to break down their sales by merchandise category. Due to changes in the classification system, comparative figures for earlier census years are not available.

Brassieres, Girdles & Foundations

Department stores accounted for over 67% of reported sales of women's brassieres, girdles and foundations in 1977. Women's ready-to-wear stores sales of \$204.0 million represented 15.3% of the total.

(continued)

RETAIL SALES BY STORE TYPE

Brassieres, Girdles & Foundations (continued)

Reported Sales of Women's Bras, Girdles & Foundations by Store Type, 1977 (Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. \$	% of total
Bras, Girdles & Foundations	35,275	100.0%	\$1,333.8	100.0%
Department stores*	7,884	22.4	894.8	67.1
Women's ready-to-wear stores**	14,820	42.1	204.0	15.3
Family clothing stores	8,807	25.0	169.3	12.7
Children's wear stores	118	0.3	0.7	0.1
Mail order houses	3,610	10.2	65.0	4.8

*Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order house data.

**Detailed data on merchandise line sales of women's accessory & specialty stores (including furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of \$858.8 million in 1977.

***Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

#Less than 0.1%

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC77-L.

Lingerie, Sleepwear & Loungewear

In 1977, sales of women's lingerie, sleepwear and loungewear were reported at \$2.14 billion in the leading store types. Department stores again took the lions' share with reported sales of \$1.48 billion, 69.2% of the total.

Reported Sales of Women's Lingerie, Sleepwear & Loungewear by Store Type, 1977 (includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. \$	% of total
Lingerie, Sleepwear & Loungewear	38,826	100.0%	\$2,143.8	100.0%
Department stores*	8,284	21.3	1,483.7	69.2
Women's ready-to-wear stores**	17,637	45.4	357.4	16.7
Family clothing stores	9,187	23.7	214.9	10.0
Children's wear stores	117	0.3	0.9	#
Mail order houses	3,601	9.3	86.9	4.1

(see footnotes on previous table)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC 77-L.

RETAIL SALES BY STORE TYPE

Lingerie, Sleepwear & Loungewear

Contribution of Women's Inner Fashion Sales to Total Women's & Children's Wear in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (mil. \$)	% of sales accounted for by:	
		Bras, Girdles & Foundations	Lingerie, Sleep- wear & Loungewear
Department stores	\$16,250.7	5.5%	9.1%
Women's ready-to-wear stores	11,066.5	1.8	3.2
Family clothing stores	3,471.6	4.9	6.2

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC 77-L.

Department Stores

The number of firms operating department stores declined to 600 in 1977, according to the Census of Retail Trade, from a total of 866 counted in the 1972 Census, representing a drop of 30.7%. The number of stores operated by these firms increased 13.7% from 7,742 department stores counted in 1972 to 8,807 in 1977. County Business Patterns reports that in 1978 there were 8,546 department stores in operation, down 3.0% from 1977.

Total department store sales in 1980 amounted to \$94.2 billion, up from \$88.5 billion in 1979, according to the U.S. Census Bureau. In 1979, in the typical department store, 6.7% of total store volume was in inner fashions according to the National Retail Merchants Association.

Sales of the women's intimate apparel departments of department stores with sales of \$1 million or more rose in 1979 on median results, for all intimate apparel categories, according to the National Retail Merchants Association. Among these department stores, sales of women's, misses' & juniors' intimate apparel increased 9.2% followed by robes and loungewear with 7.0%.

(continued)

RETAIL SALES BY STORE TYPE

Department Stores/Operating Results

Selected Typical (Median) 1979 Merchandising & Operating Results
in Department Stores With Total Annual Sales Over \$1 Million

	Adult Female Apparel	Brassieres	Corsets & Girdles	Intimate Apparel, Sleepwear & Robes	Women's, Misses' & Juniors' Intimate Apparel	All Sleepwear	All Robes & Loungewear
Net sales, % change from last year	+ 7.0%	+ 4.9%	+ 4.8%	+ 5.6%	+ 9.2%	+ 2.8%	+ 7.0%
Sales, % to total store sales	+ 36.7	0.9	0.4	2.7	1.2	0.9	0.6
Sales, % of merchandise division*	--	9.5	3.9	27.9	11.8	9.9	6.7
\$ sales per square foot of selling space	\$107.4	\$109.2	\$ 97.2	\$ 96.9	\$103.5	\$ 91.4	\$ 93.8
Cumulative markon %	50.2%	49.0%	48.9%	50.4%	50.5%	50.5%	50.4%
Gross margin, % of sales including cash discounts	43.6	51.1	50.1	49.7	51.1	49.7	48.5
Markdowns, retail, % of sales	18.2	2.8	4.4	8.4	6.0	8.6	11.3
Returns, % of sales	10.0	--	6.0	8.4	6.1	9.3	12.0
Number of stock turns	4.0	3.0	2.6	3.7	3.4	4.4	4.8
Salespeople's salaries, % of sales	7.2	--	8.5	7.8	8.0	7.5	7.6
Sales promotion, % of sales	3.1	--	2.9	3.1	2.9	3.2	3.2

*The merchandise division (equal to 100.0%) in this case is adult female accessories and intimate apparel.

Source: National Retail Merchants Association,
"Merchandising and Operating Results,"
1980 Edition.

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Large firms, with annual sales of \$1 million and over, operated 27.3% of all women's ready-to-wear stores in 1977. These outlets had combined sales of \$8.0 billion, or 64.6% of total sales in all sales of this type. Firms with annual sales under \$500,000 represented 91.9% of the total number of firms but had only 26.7% of total sales. County Business Patterns reports that in 1978 there were 39,769 women's ready-to-wear stores in operation, down 11.2% from 1977's total of 44,894.

In 1979, the typical women's ready-to-wear store did 7.9% of the total store volume in inner fashions according to the National Retail Merchants Association.

Operating Results

Women's, misses' and juniors' intimate apparel sales jumped a typical 13.1% in 1979 over 1978 intimate apparel sales in specialty stores with sales over \$1 million. This was far above the median 6.9% sales increase for all female apparel in specialty stores reported by the National Retail Merchants Association. Two other classifications reported by this source—All sleepwear; intimate apparel, sleepwear & robes—had sales increases higher than the median for all female apparel while the final two—Bras, corsets & girdles; all robes & loungewear—had smaller increases.

Selected Typical (Median) 1979 Merchandising & Operating Results In Specialty Stores With Total Annual Sales Over \$1 Million

	All Female Apparel	Bras, Corsets & Girdles	Intimate Apparel, Sleepwear & Robes	Women's, Misses' & Junior Intimate Apparel	All Sleepwear	All Robes & Loungewear
Net sales, % change from last year	+ 6.9%	+ 6.7%	+ 8.2%	+ 13.1%	+ 11.5%	+ 2.2%
Sales, % to total store sales	64.2	1.3	3.0	1.4	1.2	1.0
Sales, % of merchandise division*	100.0	16.6	33.6	12.1	11.1	11.0
\$ sales per square foot of selling space	\$145.1	\$127.5	\$121.2	\$136.5	\$111.5	\$111.3
Cumulative markon, %	50.9%	49.9%	50.5%	51.0%	50.6%	50.3%
Gross margin, % of sales including cash discounts	42.2	49.4	47.1	50.4	48.3	46.5
Markdowns, retail, % of sales	21.9	6.2	13.3	7.8	12.2	14.7
Returns, % of sales	8.5	--	--	--	--	--
Number of stock turns	3.9	2.4	3.8	3.3	4.9	4.8
Salespeople's salaries, % of sales	7.1	--	--	--	--	--
Sales promotion, % of sales	2.3	--	--	2.1	--	--

Source: National Retail Merchants Association,
"Merchandising & Operating Results,"
1980 Edition.

RETAIL SALES BY STORE TYPE

Family Clothing Stores

The 826 firms operating family clothing stores—which sell apparel for men, boys, women and children—in the U.S. in 1977, which had sales of \$1 million or more, represented 5.2% of all firms in this classification. These large firms operated a total of 5,717 family clothing stores which accounted for 72.8% of total family clothing store business in 1977.

Comparable figures for 1972 are not available. However, family clothing store firms with a volume of \$500,000 or more in 1977 operated a third of all family clothing stores and accounted for 81.2% of total family clothing store business. In 1972, firms of this size operated 26% of the stores which did 72.3% of total family clothing store business that year.

SEASONAL PATTERN IN RETAIL SALES

The trend is now for the customer to buy clothes to fit her needs in innerwear as well as other types of fashion wear. The heaviest selling period of the year for women's innerwear is during the Christmas season. Except for corsets and brassieres, whose sales are more evenly distributed throughout the year, all of the other innerwear items listed, registered sales of over 20% for the month of December. This is due primarily to the gift appeal of these items.

Percent of Year's Sales of Lingerie,
Foundation & Loungewear Departments By Months
(Five Year Average*)

	<u>Corsets & Brassieres</u>	<u>Underwear, Slips & Negligees, Total</u>	<u>Knit Underwear</u>	<u>Woven Underwear, Slips & Nightgowns</u>	<u>Negligees, Robes & Loungewear</u>
Total	100.0%	100.0%	100.0%	100.0%	100.0%
January	7.7	5.3	6.2	5.1	4.1
February	6.3	5.2	5.4	5.2	5.0
March	8.2	6.0	6.1	6.1	5.9
April	8.5	6.5	6.5	6.7	6.2
May	8.9	8.7	9.6	8.8	8.5
June	9.5	7.4	7.5	7.9	6.6
July	7.9	6.5	6.4	6.8	5.5
August	7.7	6.2	6.4	6.1	5.4
September	8.3	6.3	6.5	6.1	5.8
October	8.6	7.4	7.5	7.3	7.1
November	7.8	10.8	10.1	10.2	12.1
December	10.6	23.7	21.8	23.7	27.8

Source: Newspaper Advertising Bureau
based on Federal Reserve Board
reports (covering 1961-1965).

RETAIL ADVERTISING

Newspaper advertising lineage is available for a limited group of innerwear items. In anticipation of holiday gift buying, advertising lineage for lingerie, sleepwear and robes is heaviest during November and December. Due to the change of seasons as well as winter fashion sales, advertising lineage is also highly concentrated during May. Except for the heavier concentration during the months of December and June, advertising lineage for girdles and brassieres is fairly distributed throughout the year.

Percent of Year's Total Newspaper Advertising Linage By Months for Women's Intimate Apparel, 1979

	<u>Girdles & Bras</u>	<u>Lingerie, Sleepwear & Robes</u>
Total lineage	100.0%	100.0%
January	6.5	4.8
February	3.4	5.7
March	9.8	6.0
April	9.5	7.1
May	9.9	14.0
June	12.8	5.1
July	4.2	4.5
August	7.0	5.1
September	8.3	6.3
October	7.7	7.2
November	7.0	14.7
December	13.9	19.5

Source: The Advertising Checking Bureau, Inc.-
Neustadt Reports Division, covering
retail newspaper advertising lineage
in all newspapers in seven cities:
Chicago, Philadelphia, Cincinnati,
Dallas, Cleveland, Los Angeles and
Washington.

CONSUMER PRICE TRENDS

Consumer Price Indexes for Selected Women's Innerwear Annual Averages 1980, 1979, 1978 (12/77 = 100 unless specified)

	<u>1980</u>	<u>1979</u>	<u>1978</u>	<u>% Change</u> <u>1980/1979</u>	<u>% Change</u> <u>1980/1979</u>
All apparel less footwear (1967=100)	167.8	158.5	154.2	+ 5.9%	+ 8.8%
All women's apparel	103.1	101.3	99.4	+ 1.8	+ 3.7
Underwear, nightwear & hosiery	113.0	105.6	101.6	+ 7.0	+11.2

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Data on the purchases of specific types of women's inner fashions, shown below, have been compiled by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. This data is based on the findings of an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families. (The data for women includes family members 17 years old and older.)

Panties

Percent of Women's Panties Purchases by Type of Outlet, 1980

	<u>Units</u>	<u>Dollars</u>
Total reported purchases	100.0%	100.0%
Department stores	21.9	27.6
Discount stores, incl. K mart	29.1	24.0
National chains	29.4	26.7
Specialty stores	5.1	7.5
Variety stores	6.8	5.7
All others	7.6	8.3

Percent of Women's Panties Purchases by Price Point, 1980

	<u>Units</u>	<u>Dollars</u>
Total Units	100.0%	100.0%
Less than \$.75	22.8	9.2
\$.75 - \$.99	21.4	14.3
\$1.00 - \$1.24	11.7	9.8
\$1.25 - \$1.49	13.9	14.2
\$1.50 - \$1.99	16.8	21.5
\$2.00 - \$2.99	9.4	16.4
\$3.00 - \$4.99	3.0	8.5
\$5.00 & above	1.1	6.1

Percent of Total Panties Purchases by Month, 1980

	<u>Total</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>
Units	100.0%	7.6	7.8	9.0	5.9	7.5	7.4	9.2	8.1	8.0	8.1	10.2	11.1
Dollars	100.0%	7.5	7.5	7.6	5.7	7.7	7.5	8.4	8.7	7.8	8.2	9.4	14.1

Source: NPD Research, Inc.

CONSUMER BUYING HABITS

Slips

As measured by NPD Research, based on the purchase diaries maintained by the panel households, the total market for women's slips amounted to over 19.7 million units in 1980.

Percent of Women's Slip Purchases by Type of Outlet, 1980

	<u>Units</u>	<u>Dollars</u>
Department stores	36.4%	41.7%
Discount stores, incl. K mart	19.1	12.7
National chains	22.4	22.0
Specialty stores	14.8	17.2
All others	7.3	6.4

Percent of Women's Slip Purchases by Price Point, 1980

	<u>Units</u>	<u>Dollars</u>
Total units	100.0%	100.0%
Less than \$4.00	26.8	12.1
\$4.00 - \$5.99	27.8	22.4
\$6.00 - \$7.99	20.7	22.4
\$8.00 - \$11.99	16.6	24.3
\$12.00 & over	8.1	18.9

Percent of Total Slip Purchases by Month, 1980

	<u>Total</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>
Units	100.0%	5.9	4.3	7.2	9.7	13.1	9.7	8.7	8.5	6.8	5.9	8.3	11.9
Dollars	100.0%	5.5	3.6	6.7	9.6	13.3	10.0	8.7	8.3	6.3	5.6	9.8	12.5

Source: NPD Research, Inc.

Pajamas

NPD projected the market for women's pajamas to be 9,403,000 in 1980 with a retail value of \$72.3 million.

(continued)

CONSUMER BUYING HABITS

Pajamas

Percent of Women's Pajama Purchases by Type of Outlet, 1980

	<u>Units</u>	<u>Dollars</u>
National chains	31.7%	30.3%
Department stores	25.0	35.1
Discount stores, incl. K mart	22.3	15.5
Women's specialty stores	11.2	9.8
All others	9.6	9.3

Percent of Women's Pajama Purchases by Price Point, 1980

	<u>Units</u>	<u>Dollars</u>
Total units	100.0%	100.0%
Less than \$4.00	29.7	9.5
\$4.00 - \$5.99	15.8	10.7
\$6.00 - \$7.99	16.3	15.1
\$8.00 - \$11.99	20.4	25.6
\$12.00 - \$15.99	10.4	18.4
\$16.00 & above	7.5	20.4

Percent of Total Pajama Purchases by Month, 1980

	<u>Total</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>
Units	100.0%	8.5	4.7	7.1	4.1	8.6	4.8	5.0	4.0	4.4	16.4	14.5	17.9
Dollars	100.0%	8.2	3.3	6.7	3.6	7.8	4.4	4.0	3.7	4.8	13.2	15.8	24.5

Source: NPD Research, Inc.

Negligees

Percent of Women's Negligee Purchases by Type of Outlet, 1980

	<u>Units</u>	<u>Dollars</u>
Discount stores, incl. K mart	33.1%	22.1%
Department stores	28.6	38.0
National chains	18.2	19.8
Specialty stores	10.6	12.0
All others	9.3	8.2

(continued)

CONSUMER BUYING HABITS

Negligees (continued)

Percent of Women's Negligee Purchases by Price Point, 1980

	<u>Units</u>	<u>Dollars</u>
Total Units	100.0%	100.0%
Less than \$4.00	16.3	6.3
\$4.00 - \$5.99	24.5	15.4
\$6.00 - \$7.99	20.5	17.7
\$8.00 - \$11.99	21.7	26.0
\$12.00 - \$15.99	10.2	16.6
\$16.00 & over	6.9	17.9

Percent of Total Negligee Purchases by Month, 1980

	<u>Total</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>
Units	100.0%	7.6	7.3	3.9	5.0	7.3	5.1	8.4	5.0	5.1	8.8	14.3	22.2
Dollars	100.0%	7.2	6.7	4.1	4.9	6.8	4.8	7.8	4.6	4.7	8.3	15.7	24.4

Source: NPD Research, Inc.

Robes

Percent of Women's Robe Purchases by Type of Outlet, 1980

	<u>Units</u>	<u>Dollars</u>
Department stores	30.4%	34.6%
National chains	26.6	26.1
Discount stores, incl. K mart	24.0	17.9
Specialty stores	10.4	12.9
All others	8.8	8.2

Percent of Women's Robe Purchases by Price Point, 1980

	<u>Units</u>	<u>Dollars</u>
Total purchases	100.0%	100.0%
Less than \$8.00	20.4	8.0
\$12.00 - \$11.99	19.5	12.8
\$12.00 - \$15.99	21.0	19.0
\$16.00 - \$19.99	16.9	19.8
\$20.00 - \$29.99	15.2	23.7
\$30.00 & above	6.9	16.7

(continued)

CONSUMER BUYING HABITS

Robes (continued)

Percent of Total Robe Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	8.6	6.8	5.0	4.7	9.6	5.1	7.0	4.0	5.0	6.5	13.1	24.3
Dollars	100.0%	7.8	6.4	3.9	4.1	7.2	3.9	5.3	3.8	5.5	6.3	17.2	28.6

Source: NPD Research, Inc.

The SEVENTEEN Magazine Lingerie, Hosiery and Foundation Study was conducted to acquire information concerning ownership and purchasing characteristics of these garments among teenage girls. Areas of specific interest included types and quantity of lingerie and foundation items currently owned and the types, number and price paid for these items purchased in the last year.

Questionnaires were mailed in May, 1980 to 2,000 members of SEVENTEEN'S Consumer Panel, representing a cross-section of the teen market. The first 818 returns were processed and form the basis of the study.

Teenage Purchase & Ownership of Lingerie & Foundations

	Percent Owning	Average Number Owned	Percent Purchasing	Average Number Purchased	Average Price Paid
<u>Slips</u>	94.9%	4.0	71.8%	2.4	
Half-slips					
Short	82.9	2.1	53.4	1.5	\$ 6.63
Long	44.9	1.2	18.1	1.1	7.68
Full-slips					
Short	42.3	1.5	20.4	1.3	8.43
Long	18.5	1.2	8.3	1.1	10.25
Camisoles	24.0	1.4	16.9	1.2	7.19
Bra slip	8.1	1.5	5.0	1.4	8.73
Tap/dance pants	7.5	1.6	5.5	1.4	6.64
Dirndle or circular petticoat	3.5	1.2	1.6	1.0	9.83
Petti-culotte	1.8	1.6	0.6	1.4	7.57
<u>Panties</u>	97.9	15.8	89.6	10.2	
Bikini					
Regular	83.2	12.3	71.4	8.3	2.78
String	8.8	3.5	6.1	2.2	2.88
Regular brief	57.3	7.8	43.5	6.5	2.73
<u>Sleepwear/loungewear</u>	97.2	9.0	80.9	3.9	
Robes					
Long	80.6	1.6	41.7	1.9	13.18
Short	36.6	1.4	28.0	1.8	9.33

(continued)

CONSUMER BUYING HABITS

Teenage Purchasing & Ownership of Lingerie & Foundations (continued)

	Percent Owning	Average Number Owned	Percent Purchasing	Average Number Purchased	Average Price Paid
<u>Sleepwear/loungewear (continued)</u>					
Nightgowns					
Long	71.1%	3.0	36.3%	1.2	\$20.64
Short	54.6	2.6	13.0	1.1	14.22
Nightshirts					
Short	57.8	2.5	33.4	1.9	8.06
Long	17.1	1.4	9.9	1.4	10.21
Pajamas					
Full length	37.0	1.8	17.7	1.3	12.34
Shortie	29.1	2.4	11.9	1.6	9.10
Lounging pajamas	9.7	1.3	5.0	1.2	16.14
Caftan	4.3	1.1	1.3	1.4	19.38
<u>Bras</u>	96.8	7.6	89.9	4.6	
Bandeaux					
Seamless	37.0	1.8	34.4	2.4	7.03
Softcup	71.1	3.0	30.8	2.5	6.33
Light padded	57.8	2.5	27.3	2.5	6.27
Full padded	17.1	1.4	2.8	2.3	6.69
Front closing	36.6	1.4	32.4	2.0	6.76
Strapless	80.6	1.6	27.9	1.2	6.61
Underwire	29.1	2.4	20.0	2.1	8.30
One-size (stretch step-in)	4.3	1.1	9.7	1.8	5.31
Bodysuit					
Sized	9.2	2.4	6.6	1.6	10.49
One size	5.9	1.9	3.3	1.9	8.79
Stretch coordinated sets (bra & brief)	5.0	3.0	6.1	1.8	9.33
Halter	9.7	1.3	5.7	1.4	5.22
Body briefer (all-in-one)	2.2	1.4	1.2	1.4	12.35
<u>Girdles</u>					
Panty					
Brief	6.0	1.6	3.7	1.5	6.33
Short leg	0.7	1.8	0.4	1.0	6.44
Long leg	0.6	2.0	0.1	1.0	11.00
Regular	1.1	1.1	0.4	1.0	12.25
Garter belt	1.2	1.2	0.7	1.2	6.30

CONSUMER BUYING HABITS

Type of Store Where Innerwear & Sleepwear Is Purchased * (Base: All Girls)

	<u>Foundations</u>	<u>Lingerie</u>	<u>Sleepwear</u>
Department stores	83.2%	81.2%	78.5%
Boutique/specialty stores	9.2	10.5	11.2
Discount stores	6.0	8.2	9.0
Hosiery/lingerie stores	6.7	8.7	3.1
Variety stores	2.4	2.2	3.5
All other	1.6	3.2	4.9
Don't know	2.9	3.4	4.2

*Total adds to more than 100.0% due to multiple answers

Source: SEVENTEEN Magazine,
Lingerie, Hosiery and Foundation Study,
1980.

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CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. (\$15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, \$20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of \$50 million or more, are included.

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HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) on number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

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MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans are included.

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WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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